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# PROTECTED AREAS, LOCAL COMMUNITIES AND ECOTOURISM

NEW EXAMPLES OF  
SUSTAINABLE DEVELOPMENT FROM BULGARIA

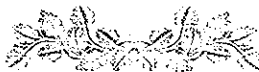




**ECOTOURISM** based on protected areas conserves the natural environment and contributes to the well being of local people. As one of the fastest growing sectors in the world, this form of sustainable tourism has been cited internationally as a major opportunity for local economic growth and rural development in partnership with managed protected areas.



*The Bulgarian Protected Areas  
Act of 1998 provides a sound policy framework  
for ecotourism development related to biodiversity resources.  
The law identifies the purposes of protected areas to include the "creation of opportunities for enjoyment of the nature by visitors, AND the creation of opportunities for the local people to benefit from living close to these areas."*



**The country's first protected area management plans for Central Balkan and Rila National Parks** provide real opportunities for local tourism development linked to resources and sites found within the Parks. These 10-year strategic plans are also a framework for ecotourism activities and projects in the communities surrounding the parks. Natural attractions, their interpretation, and special, park-based recreation, provide ideal opportunities to create partnerships with local communities and ecotourism development.





## THE PROJECT

The Biodiversity Conservation and Economic Growth Project (BCEG) is implemented in Bulgaria as an important element of 10 years of support by the United States Government for biodiversity conservation and management of protected areas in the country. The National Parks and the rest of the country's protected area network are seen as the primary tools for conservation in this 'hot spot' of European biodiversity.

One of the Project's tasks is to develop "models" of economic growth in the municipalities around the National Parks. These models focus on the sustainable use of natural resources. Ecotourism is one of these opportunities.

### CREATING A "WORKING MODEL"

The National Parks rely on active partnerships with the people and organizations in municipalities around the Parks to successfully implement their management plans. Park management realizes they must balance resource protection with the development of opportunities for local communities to benefit from continued access and "exploitation".

The "working model" being developed by National Parks includes the establishment of ecotourism partnerships. These partnerships are a product of a participatory management planning process. Park management knows they must **nurture partnerships** that draw on local expertise and familiarity with the protected areas. Ecotourism partnerships work to support comparative advantages for local tourist development and to promote local engagement in nature conservation efforts. National Parks are working to create a model where **shared responsibilities and shared benefits** between the National Parks, local government, and entrepreneurs result in jobs, income, and create marketable advantages, civic pride, and ensure nature conservation.

In order to foster this model, Rila and Central Balkan National Parks launched pilot ecotourism activities in 2001, within two geographic regions - one for each park. These areas are selected in response to local needs, local ecotourism development opportunities, community responsiveness, and the engagement of local government.

### TEAM WORK AND STAKEHOLDERS - GUIDING THE "MODEL"

To help institutionalize these models, the National Parks support "working groups" that test theory and apply the resolve of these new partnerships. These working groups have been organized at two levels:

#### *National Ecotourism Working Group*

This working group helps to coordinate activities between Parks and national institutions responsible for ecotourism development. It is a recognized focal point for contributions to policy elements of ecotourism that are evolving in the country. The group consists of representatives of the Ministry of Environment and Waters and the Ministry of Economy, the BCEG Project, representatives from the National Parks, the Nature Parks, national associations for alternative and ecotourism, environmental information and education centers, and regional tourism associations.

#### *Local Ecotourism Initiative Groups*

These working groups develop practically each element of the ecotourism model and



## **MAJOR STEPS OF THE ECOTOURISM PILOT MODEL**

### *How the "Model" Evolves*

#### **Identifying Interested Participants and Opportunities**

During the preparation of the National Park management plans, Park Directorates specifically organized forums for discussing park-based tourism and community ecotourism development. These meetings helped to identify local tourism stakeholders and to analyze their expectations and needs. The results of these discussions are incorporated into the management plans, and used to identify pilot sites for ecotourism "model" development.

#### **Local Ecotourism Initiative Groups**

The two National Parks, assisted by the Biodiversity Conservation and Economic Growth Project, initiated and supported the formation of groups of motivated and energetic community representatives within the pilot regions.

#### **Groups Assess Opportunities within the Parks and in their Surroundings**

One of the first efforts of these groups is to identify and describe all existing opportunities for tourist services and products within the Park territory and in their surroundings. Extensive inventories of these opportunities are created.

#### **Training and Technical Assistance**

At regular meetings and with the assistance of Bulgarian and international consultants, the initiative groups analyze and identify their needs for training and technical assistance. Training themes include business planning, creation of regional ecotourism products, advertising and marketing strategies, information coordination with other tourist agencies and associations, and organizational development. They receive access to tailored training and technical assistance. Skills are periodically reassessed.

#### **Market Surveys**

Understanding your market is key to good business. In order to promote local ecotourism goods and services, initiative groups need access to profiles of their visitors - their preference, their budgets and their interests. Each group participates in the development of market survey tools that are administered to specific target groups by social and market survey experts. The results of local and national domestic tourist market surveys are fed back to initiative groups.





### **Creating Appropriate Eco-Tourism Products and Marketing Them**

Assisted by experts, the two initiative groups created their first, specialized ecotourism products based upon the attractions and activities in the pilot areas of each National Park. Each Initiative Group created and hosted a set of tourist activities/products in conjunction with special events and activities in their respective National Parks. These events are “catalytic” in helping groups organize, make collective decisions, and offering a coordinated package of products. Such activities are repeated to build confidence and to improve product development.

### **Selecting Appropriate Indicators for Success and Impact**

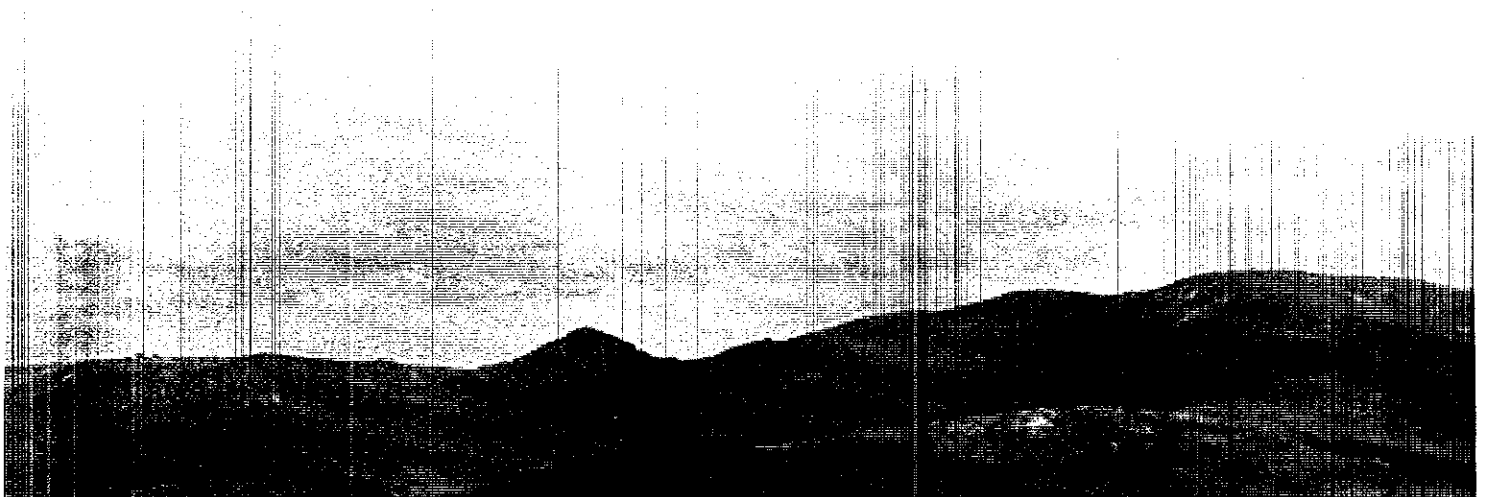
To demonstrate a successful model, each Initiative Group engages in the selection of indicators and the means for measuring success. Indicators of success and impact are selected and baseline data is collected. Over time, changes in conditions and impacts are checked. Indicators include social and economic conditions, as well as impacts to the community and natural environments.

### **Creating and Improving Small Business**

Initiative Groups will judge their success, in part, through the development of small businesses linked to ecotourism in and around the Parks. In order to establish new enterprises, expand others, create jobs and make money, entrepreneurs are gaining skills and confidence to develop appropriate enterprises. Small business planning is being linked to commercial bank loans and other sources that support new rural development opportunities.

### **Using the Model to Inform National Policy**

Using the results of these ecotourism pilot programs, the National Working Group and the BCEG Project are making contributions to the Bulgarian Government's ecotourism policy and national strategy. Given the rich biological diversity of country and its system of protected areas, Bulgaria is poised to forge a niche market for ecotourism linked to rural development, mountains, protected areas and biodiversity conservation.





## PILOT PROGRAMS

### PARTNERSHIPS BETWEEN PARKS, PUBLIC AND PRIVATE SECTORS

## RILA NATIONAL PARK

*Declared in 1992 in order to preserve the unique diversity of plants, animals, and habitats in the mountain. Rila has an area of 81,046 hectares and is a high mountain, glacial relict park with much of its tourism conducted around more than 100 lakes, and in alpine and sub-alpine habitats. It is the largest National Park in Bulgaria.*

### Tourism Services and Features

- ✦ There are 17 chalets and 5 shelters within the Park.
- ✦ Numerous trekking routes cross the Park. Many are located in the high mountain sections, in open areas with stunning high-mountain scenery.
- ✦ Two major European tourist trekking routes - E4 and E8, cross the Park - east/west and north/south.
- ✦ Rock walls and outcrops (the northern wall of Malyovitsa, Zlia Zub, Orlovets, etc.) provide excellent opportunities for mountaineering.
- ✦ The National Center for Mountaineers and Mountain Guides Training, at Malyovitsa, establishes Rila as an important focal point for mountain training programs and mountain sports.
- ✦ The country's largest ski area, Borovets, lies in close proximity to the Park, but is just outside its boundary.
- ✦ There are additional alpine and adventure skiing facilities near the chalets of Skakavitsa and Rilski Ezera.
- ✦ The Park has identified an extensive system of camping and rest areas for both the day visitor and those interested in a more rigorous outing.
- ✦ The Park is developing visitor infrastructure, which provides information and creates opportunities for recreation.



## PILOT PROGRAMS

### PARTNERSHIPS BETWEEN PARKS, PUBLIC AND PRIVATE SECTORS



#### The Rila Ecotourism Pilot Region

The Park's ecotourism pilot region is located to the north of the Park. It covers two Park administrative sections - Govedartsi and Beli Iskar. Both are part of Samokov Municipality. The pilot region includes the town of Samokov and the villages of Beli Iskar, Govedartsi and Mala Tsurkva. All afford easy access to the National Park and are located only one hour from Sofia. The area is considered a haven for rest, relaxation, clean air, and renewal among the waters and forests of Rila National Park.

There are **three main hiking routes** within the pilot region:

- ✦ Borovets - to Mussala chalet and the routes to Grunchar chalet;
- ✦ Malyovitsa - to Malyovitsa chalet and the routes to Malyovitsa peak, Strashnoto lake, Rila Monastery, etc.;
- ✦ Govedartsi for Vada chalet and on to the Seven Lakes.

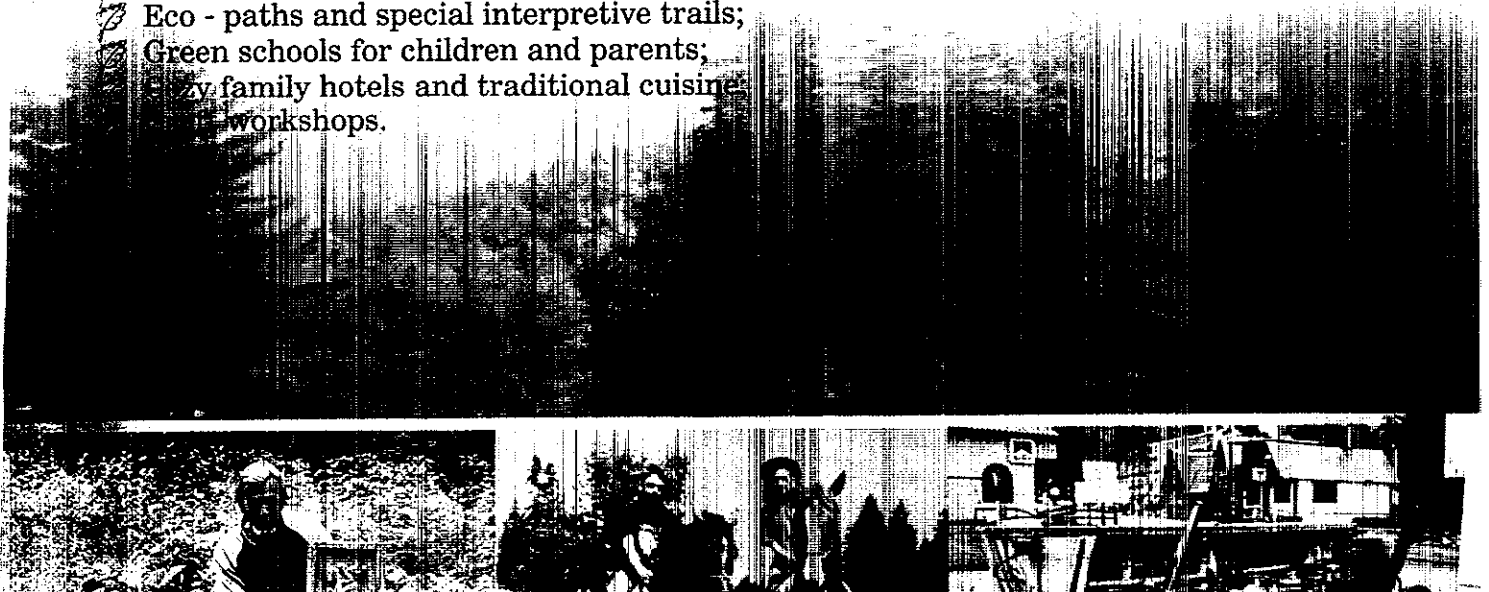
**Samokov town** is famous for the largest art school in the Balkans. During the Renaissance, it was one of the most significant commercial, craft and cultural centers in Bulgaria. Of special interest to the visitor are the History Museum, the Town Gallery, several private galleries and the preserved shrines of three religions - the Christian, the Muslim, and Jewish faiths.

**The three villages** Beli Iskar, Govedartsi and Mala Tsurkva are situated in the very outskirts of the park. They offer a traditional atmosphere, clean air, natural splendor, and local hospitality.

**Traditional crafts** still flourish here with workshops for woodcarving, knife making, pottery, linen, and fine embroidery.

#### Ecotourism programs include:

- ✦ Guided walking tours to attractive natural sites, including wildlife viewing and the area's special plant diversity;
- ✦ Horseback riding tours in and outside the Park, and a horseback riding school;
- ✦ Mountain biking tours;
- ✦ Winter tours of the Park on skis and snowshoes;
- ✦ Eco - paths and special interpretive trails;
- ✦ Green schools for children and parents;
- ✦ Eco family hotels and traditional cuisine;
- ✦ Workshops.







## PILOT PROGRAMS

### PARTNERSHIPS BETWEEN PARKS, PUBLIC AND PRIVATE SECTORS

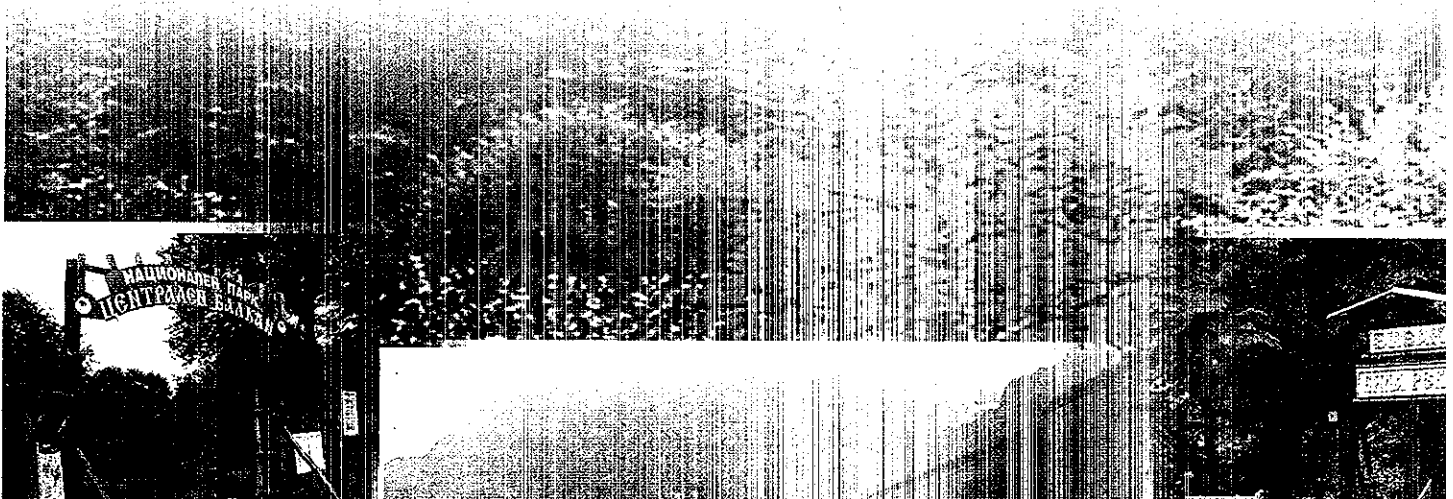
## CENTRAL BALKAN NATIONAL PARK

*Declared in 1991 to preserve the exceptional nature of Middle Stara Planina, and the traditions and livelihood related to it, for the benefit of the world. Central Balkan has an area of 71,669.5 hectares, and is the second largest National Park in Bulgaria.*

*Visitors enjoy a rolling terrain of high mountain meadows, ancient forests, and rocky outcrops.*

### Tourism Services and Features

- ✦ There are a total of 20 chalets found within the Park.
- ✦ The international trekking route E - 3 passes along the central ridge of the Park. This is the trekking route with one end at the Atlantic Ocean and the other at the Black Sea.
- ✦ Gateways to the Park are afforded through the villages of Cherni Vit, Ribaritsa, Chiflik, Cherni Ossam, the town of Apriltsi, Lugut locality. There are 16 marked tourist - hiking routes starting on the northern side.
- ✦ Southern gateways include hiking starting from the villages of Anton, Rozino, Hristo Danovo, Tuzha, Gabarevo, Skobeleva and the towns of Klisura, Sopot, Karlovo, Kalofer. There are 9 marked tourist routes.
- ✦ Ample rock massifs and rock walls create excellent conditions for mountaineering. The most popular among mountaineers are the rocks in the region of Kupena peak, Northern Dzhendem, and the rocks at Rai chalet. Alpine skiing and ice climbing are conducted above Pleven chalet.
- ✦ Park Management has identified special routes for nature interpretation, mountain biking, horseback riding, cultural and historic treks, and specialized winter and summer alpine activities. The Park also provides great opportunities for caving and cave - diving, as well as photographic tours.
- ✦ The Park is developing the visitor infrastructure. This includes information signboards for the values of nature and rules for behavior, as well as convenient sites for recreation.





## PILOT PROGRAMS

### PARTNERSHIPS BETWEEN PARKS, PUBLIC AND PRIVATE SECTORS



#### The Central Balkan Ecotourism Pilot Region

The National Park's pilot region is located in the southeastern section of the Park, in Kalofer Town. Historic **Kalofer Town** (3,900 residents) is part of Karlovo Municipality, and is the most distinctive Balkan town in the Municipality. It lies 160 km to the east of Sofia, near the Sofia-Bourgas train and auto routes. The town provides easy access to the Park and the Rai Chalet - one of the most beautiful locations in the Stara Planina. The National Park starts literally a few steps away from the last houses of the town. A walk of only half an hour provides seclusion among century-old beech forests.

There are **two major hiking routes** within the pilot region:

- ✦ Kalofer - Parajik - Rai chalet - Levski chalet
- ✦ Kalofer - Parajik - Rai chalet - Botev peak

Kalofer town center is dominated by Bulgarian renaissance architecture and the memorial complex dedicated to Bulgaria's poet and revolutionary, **Hristo Botev**. Kalofer is one of the few Bulgarian towns with a large number of operational monasteries, churches and chapels. It is also a town of strong traditions, with many ceremonies performed here every year.

Kalofer's living tradition is represented by its numerous craftspeople, and the town is well known for its woodcarving, artistic textiles, pottery, and most of all - the unique Kalofer lace. Lace making was brought from Brussels in the beginning of last century.

#### The ecotourism programs include:

- ✦ Opportunities for alternative and adventure experiences, e.g. mountaineering, ice climbing, and caving;
- ✦ A new walking route from Kalofer to Rai Chalet;
- ✦ Winter tours with skis and snowshoes;
- ✦ Specialized routes for botany and nature interpretation;
- ✦ Eco-paths, offering unusual and exciting walking experiences;
- ✦ Comfortable and safe locations for picnics;
- ✦ Green schools for children and parents;
- ✦ Comfortable and enjoyable camping at the new campground, "Biala Reka";
- ✦ Cozy family hotels and traditional cuisine;
- ✦ Craft workshops.

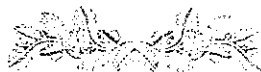




## ACCOMPLISHMENTS TO DATE

Each National Park Pilot region has formed "ecotourism initiative groups" who have elected to form and register their own **non-governmental organizations**. These are designed to cement partnerships with the National Parks. NGOs are being created in Samokov municipality and in Kalofer town. Each group:

- ✍ has formulated its vision for the development of ecotourism in the regions;
- ✍ has conducted a series of public presentations and public awareness activities in the settlements;
- ✍ is developing local tourism centers, marketing materials, and new products in relation to Parks and nature conservation.



**JUNE 2001** - Both initiative groups received **specialized technical assistance** from the BCEG Project. Ecotourism consultant, Professor Donald Hawkins, from the George Washington University, and 13 business development consultants from his department helped initiative groups to develop and design their collective ecotourism programs for the pilot areas.



Initiative Group members received **additional training** in development of tourism products, management of tourism and natural resources in the Parks, business planning, and in-depth orientations to the functions and responsibilities of National Park Directorates, their management plans, and local tourism development opportunities.



**OCTOBER 2001** - Each Ecotourism Initiative Group has developed and conducted **major public events** together with their respective National Parks

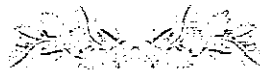
- ✍ The Central Balkan National Park 10th Anniversary. A two-day event of special activities.
- ✍ The Rila National Park celebration dedicated to the opening of the first new tourist infrastructure at the foot of Malyovitsa Mountain. The group hosted another successful two-day event.



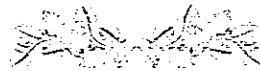
## ACCOMPLISHMENTS TO DATE



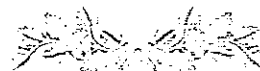
**NOVEMBER 2001** - Members of the National Working Group and each Ecotourism Initiative Group participated in a two - week **study tour to the USA**, where they became acquainted with the practical experience of American colleagues dealing with ecotourism in the rural communities bordering protected areas in the State of Tennessee. The study tour was funded by USAID's TRANSIT program.



Each Ecotourism Initiative Group is developing new tourist information centers. Each center will become a **"destination management center"** - a focal point for regional reservations, marketing, and activity coordination. Both centers are developing grant proposals for national and international funding.



**JANUARY 2002** - 13 entrepreneurs from the two Ecotourism Initiative Groups participated in business-planning workshops. With technical guidance from the Firm Level Assistance Group (FLAG)/University of Delaware, some of these plans are evolving into bankable business proposals. One of these business plans has already received a commercial loan from a major Bulgarian banking institution. Other entrepreneurs are developing business plans and using these for application to other sources for loans that will help them "grow"-their businesses. This approach is in preference to subsidies and grants to local business development.



**MARCH and APRIL 2002.** The first national domestic ecotourism market surveys are conducted. These surveys collect domestic market information to help Parks and Ecotourism Groups better understand the market potential and market reality for ecotourism. Ecotourism Initiative Groups are using the results of these surveys to develop new products, and to target their marketing and information strategies.



**JUNE 2002** - The National Working Group and the Ecotourism Initiative Groups are working together to develop and monitor a set of impact and success indicators. Baseline data for both pilot regions is being collected with the assistance from the University of Sofia's tourism department staff and students. This data will help the pilot efforts to track changes in a number of key areas linked to ecotourism development-environmental, social, and economic changes that can be attributed to ecotourism development efforts.





## MORE STEPS AHEAD KEY ELEMENTS FOR A NATIONAL ECOTOURISM STRATEGY

The pilot programs of both National Parks are new to the protected area system. They are also new for the tourism sector in Bulgaria. With the success of these models, and similar efforts being conducted in and around other protected areas, we clearly see a growing comparative advantage for ecotourism in Bulgaria. In order to nurture and “grow” these opportunities, the BCEG Project is promoting the following as important for a National Ecotourism Strategy.

### ECOTOURISM INVESTMENT / MATCHING GRANTS FUND

Investment capital is scarce in Bulgaria, and even more so for rural tourism linked with nature conservation. Development of ecotourism enterprise in Bulgaria is seen as a viable economic growth activity, and a legitimate part of rural development. **A fund that consists of the best of the micro, small and medium enterprise, and a municipal matching grants component is seen as key to capital investment in this sector.** Such a Fund can be linked to regional development strategies, decentralization, and support local government capacity. In the absence of sufficient private sector support and commercial loans for this sector, the Fund is a bridge between Government subsidies and full-scale private investment.



**MORE STEPS AHEAD**  
**KEY ELEMENTS FOR A NATIONAL ECOTOURISM STRATEGY**



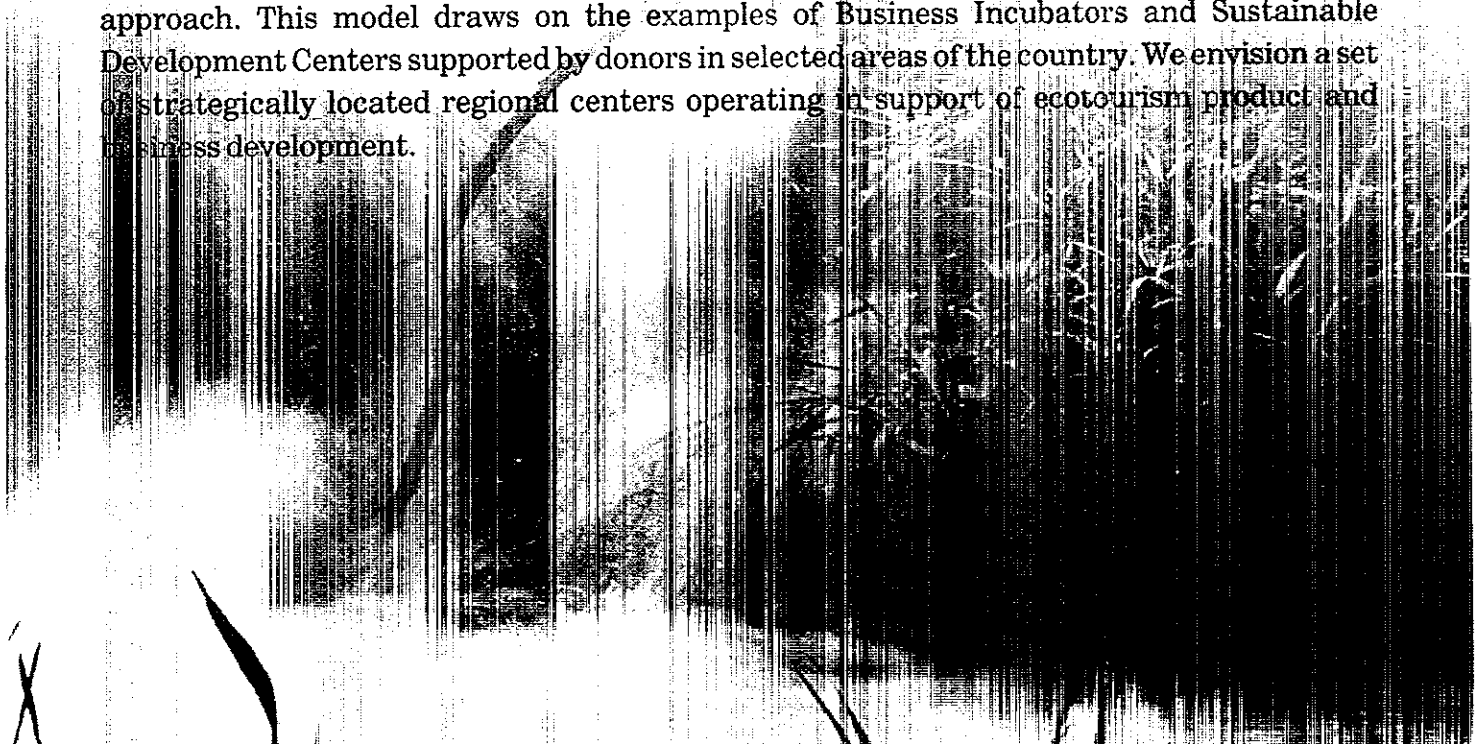
**PROTECTED AREAS ECOTOURISM COMPETITIVE CLUSTER CONCEPT**

The BCEG Project continues to seek ways to engage the Government and international donor community in the creation of **a national initiative in support of the future of the protected area based ecotourism**. The "ecotourism competitive cluster" concept is a strategic set of activities and services organized as a complete ecotourism supply chain. The core of the "cluster" is the comparative advantage represented by the nation's protected areas natural attractions and biodiversity. The Competitive Cluster is used to support a set of strategic relationships between donors, the private sector and government. The National Working Group is the first step in development of cluster concept for ecotourism. We are working with Government to examine ways to institutionalize the working group.

One of the key tools for formalizing the relationships created through the Working Groups is the development of a **Memorandum of Understanding between the Ministry of Environment and Water and the Ministry of Economy**. This MOU will aim to secure more effective coordination of marketing, information sharing, and strategic ecotourism development and promotion.

**ECOTOURISM ENTERPRISE CENTERS (EECS) - BUSINESS INCUBATORS**

To be successful, initiative groups need to find the ways and means to assure on - going technical and financial assistance for ecotourism enterprise development. The goal of **ecotourism enterprise centers (incubators)** is to promote the creation and strengthening of strategic new businesses using a protected area - ecotourism competitive cluster approach. This model draws on the examples of Business Incubators and Sustainable Development Centers supported by donors in selected areas of the country. We envision a set of strategically located regional centers operating in support of ecotourism product and business development.





## 2002 - BULGARIA CELEBRATES THE INTERNATIONAL YEAR OF ECOTOURISM AND MOUNTAINS

The elements of the National Parks Ecotourism Pilot Program and the opportunities to tailor an Ecotourism Strategy for Bulgaria will be celebrated in a **“catalytic” event in October of 2002**. The experiences and opportunities for ecotourism linked to Bulgarian protected areas will feature as national and international guest gather to celebrate the international themes of 2002.

### The Event

***The goal of the Event*** is to catalyze a dialogue between the state and public sectors about the economic growth opportunities between protected areas and ecotourism development. This dialogue is the foundation for elaborating a National Strategy for Development of Ecotourism in Bulgaria, and is an important part of the new national tourism development policy.

***The hosts of the Event*** - the Ministry of Environment and Water, and the Ministry of Economy.

***The Event includes two parallel programs:***

*A National Forum for:*

- ✦ Ecotourism policies and planning the challenges of sustainable development;
- ✦ Ecotourism management institutional framework and responsibilities;
- ✦ Development, marketing and promotion of ecotourism products encouraging the sustainable tourism products and their consumers;
- ✦ Monitoring the ecotourism price and benefits; ensuring equitable distribution between key participants in the process;
- ✦ Surveying the ecotourism market;
- ✦ Competitive Ecotourism Cluster; and
- ✦ Financing Ecotourism.

Important international speakers will include representatives of the United Nations Environmental Program (UNEP), The Ecotourism Society, the World Tourism Organization, George Washington University, as well as representatives from Central and Eastern European countries. Speakers from Bulgaria include key Government representatives, the nature protection community, universities, national tourism associations, and the private sector.

*An Ecotourism Fair with exhibitions open to the Public featuring:*

- ✦ Protected areas and opportunities for alternative and nature tourism;
- ✦ Local communities and protected areas existing partners for ecotourism;
- ✦ National and Regional Associations formed around Ecotourism;
- ✦ Private sector suppliers for activities that support nature and ecotourism
- ✦ Donor programs and Government support for ecotourism.



